

The 2012 Insight Market Research Agenda

2012

MARKET
RESEARCH
AGENDA

Telecom and the Financial Services Industry: Optical Networking, Wireless Networking, and the Role of Redundancy and Recovery in Financial Transactions, 2012-2017

www.insight-corp.com/reports/financial12.asp

While the sanctity of transactional data is important to every vertical industry, it assumes critical significance in the banking and financial vertical. Over the years, banks, Wall Street investment firms, insurance companies, and other financial institutions have led the way in securing their networks by establishing sound business continuity practices and have also made the huge investments necessary to ensure safe data transport and management. As telecommunication provides the backbone of the data management architecture, the robustness of telecom topology is critical in determining the effectiveness of the financial industry's business continuity practices.

Data recovery during outages has acquired the shape of a distinct market. This report examines the role played by telecommunications in facilitating data storage, security and integrity in the financial domain. This study will cover market sizes for relevant metrics such as disaster recovery applications, hosting services, security management, backup and storage management, load balancing, storage area networks as well as wireless and wireline traffic and revenues associated with data recovery through resource redundancy in the finance domain.

The Future of Telecommunications, 2012-2017

www.insight-corp.com/reports/futuretel12.asp

Continuing economic turmoil and demands being placed on the worldwide telecommunications industry necessitate a systematic look forward at possible outcomes based upon forces pushing the industry forward: the end user's demand for more bandwidth, increased reliance on mobility services, and the end users' assessment of cost versus performance.

The technologies forcing structural change include IP transport's ability to merge voice, video and data; spiraling demand for 4G bandwidth pushing backhaul investments; diminishing levels of competition; the variety of local broadband wired and wireless solutions; increasing security requirements and a corresponding decrease in the ability to protect users on the Internet.

Thus far, the industry has reacted to major structural change through consolidation, as carriers merge and equipment suppliers struggle to survive. On the domestic and international levels, regulators and government agencies are struggling to cope with rapid, profound structural change in an industry that had been predictable for more than 100 years.

In this study, Insight will present possible future scenarios for how the forces now at work will reshape the worldwide telecommunications industry and the impacts each scenario will have on the industry's existing revenue models.

Managed Services in an IP World: New Opportunities for Wireless and Wired Networks, 2012-2017

www.insight-corp.com/reports/manserv12.asp

The Managed Services market continues to expand as enterprise customers turn to service providers for end-to-end network solutions. Outsourcing everything from network designs, to equipment, to 24x7 management, the enterprise IT manager has an expanding array of options to choose from as service providers continue to increase their offerings to address corporate demand. As customers shift more of their applications to the cloud and shift their endpoints to wireless access, Managed Services becomes a more valuable tool to manage ever-increasing network complexity.

In this study, Insight will provide a detailed analysis of the current state of the managed services marketplace: the providers (telecom carriers, equipment vendors, CATV operators and systems integrators), the technology, and the scope of current service offerings. The study will differentiate five segments of the managed services marketplace: managed WAN services, managed LAN, mobility management, data center, and managed infrastructure. In addition to the revenue forecasts for these market segments, forecasts are provided for various market subdivisions, including managed IP VPNs and IP endpoints, managed security services, managed WLANs, VoIP services, managed hosting and managed storage and a number of other significant areas within the Managed Services domain.

Cable TV Operators, Telecom Services, and the Push into the Enterprise, 2012-2017

www.insight-corp.com/reports/enterprise12.asp

Business telecom services had been the exclusive province of telcos, but that is changing. Telecom providers such as Verizon and AT&T have had a 30-year head start over CATV operators in supplying business services. And while CATV operators such as Comcast, Time Warner Cable and Cox have extensive access networks that pass within several hundred feet of most businesses, their business services market share is only in the single digits. The opportunity appears obvious and, indeed, every major cable operator is targeting small businesses and enterprises as their top priority over the next five years.

This report will be essential reading for all providers offering telecom services to the enterprise and small business market. This study examines how CATV operators are leveraging their existing fiber networks—built primarily to transport broadcast video services—to support business telecommunications services. We survey all of major CATV and telcos and tell how providers are addressing enterprise and SMB needs. Five-year revenue and unit forecasts are provided for hardware and network services, fiber optics, wireless access, and IP transmission forecasts are included for analysis.



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Private Line and Wavelength Services, 2012-2017

www.insight-corp.com/reports/pl12.asp

Increasing demand for wireless backhaul and converged solutions using VoIP and MPLS are driving the demand for local private lines. The market for high speed point to point circuits is expected to remain moderately positive over the next few years, even as Ethernet takes an increasing share of the point-to-point market. This study will also provide an update on the status of new copper technologies and their deployment vis-à-vis the more traditional fiber private line solutions.

Does the demand for ever-increasing amounts of bandwidth translate into increasing revenue for private lines? Will the emergence of nationwide 4G wireless solutions alter the competitive landscape? This report explores the question of how and when the new 4G infrastructures will create a threat to traditional landline private lines.

A private line is a dedicated non-switched circuit or channel that is leased for a specified period. This channel provides a private and direct connection between at least two sites. *Private Line & Wavelength Services, 2012-2017* details revenue and circuit counts by carrier type, and defines the split between wholesale and retail sales of T-carrier (T1, T3) and OC-N circuits (OC-3, OC-12, OC-48, OC 192, OC-768), gigabit Ethernet, and wavelength services. Insight's annual study illustrates how carriers and their customers continue to move to higher capacity circuits in order to reap the benefits of lower cost-per-bit transport.

The 2012 Telecommunications Industry Review: An Anthology of Market Facts and Forecasts

www.insight-corp.com/reports/review12.asp

The 2012 Telecom Industry Review summarizes current conditions across the global telecommunications industry, providing analysis of over a dozen infrastructure and service segments. From fundamental background issues to detailed five-year forecasts accompanied by practical strategic advice, this study provides a sweeping examination of the telecom marketplace.

The Review provides up-to-date information in such key areas as wireless high-speed access, optical networking, VoIP, cable telephony, residential and business communications trends, and new opportunities such as various IP-based applications delivered as services as well as device-independent IPTV.

Whether you are an industry veteran or new to telecom, the 2012 Telecom Industry Review will serve as a frequently referenced yearbook, supplying hard data and sound analysis on pressing service and equipment issues. Concise, clear, and current, the review is a detailed strategic tool that amasses a year's worth of telecom research—over a dozen segments—into one comprehensive resource.

Carriers and Ethernet Services, 2012-2017

www.insight-corp.com/reports/ethernet12.asp

Ethernet, the protocol that is ubiquitous in enterprise local area networks, is now offered by service providers in most metro areas and as a wide area service. These publicly available Ethernet services have been among the communications market's fastest growing segments, with carriers enjoying revenue growth in the range of 22 percent annually as enterprises large and small opt for these new services offered in an array of speeds and reach.

Carrier Ethernet services, which is a \$4.1 billion market in the US, offers the enterprise customer the chance to tie locations together in virtual LANs that can stretch across a metropolitan area, a region, a nation, or the world. These widely available Ethernet services offer significant advantages in cost, simplicity, and in facilitating convergence—and are often touted as a replacement for legacy data solutions like private line and frame relay.

This Insight study projects market size, growth, and revenue, including segmented breakdowns of point-to-point and any-to-any services as well as by interface levels ranging from 10 Mbit/s to the emerging 40- and 100-Gbit/s standards. This report provides insight into this emerging arena that will fundamentally shape the communications market of the future

US Hispanic Use of Telecommunications Services: Spending Patterns for Wireless and Wireline Services, 2012-2017

www.insight-corp.com/reports/hisp12.asp

Nearly one out of every three dollars spent on residential telecommunications services in 2011 came from US ethnic communities, so the spending power of the Hispanic-American, African American, and Asian-American communities have become crucial to the survival of telecommunications providers. This market report takes a close look at the purchasing habits and telecom usage patterns of the burgeoning Hispanic segment of the US population. In the last census, Hispanics surpassed the African-American population as the largest minority group in the US. US Hispanic purchasing power is now growing at nearly twice the rate of the general population, fueled by continued population growth and increasing Hispanic employment and income levels.

US Hispanics are heavy users of local, long-distance, international, and wireless calling. Prepaid and post-paid services have also experienced explosive growth in the US Hispanic market.

In this report, Insight examines spending by US Hispanics on local, long-distance, wireless, and pre-paid services, and compares these spending patterns to the general population and to other minority segments including Asian Americans and African Americans.

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Telecom Services in Vertical Markets, 2012-2017

www.insight-corp.com/reports/vert12.asp

Telecom Services in Vertical Markets, 2012-2017, the fifteenth market analysis study in this series from Insight Research, quantifies the telecom spending habits of major US industry segments for wired and wireless services. This report examines wired and wireless spending trends in the general economy and then delves into wired voice and data service spending patterns and wireless spending for specific industry segments, including: healthcare; construction; retail trade; wholesale trade; educational services; financial, insurance, and real estate services; professional business services; hotel and lodging; transportation; communications; utilities; entertainment and media; durable manufacturing; and non-durable manufacturing.

As competition drives down margins, solution selling into vertical markets enables real competitive differentiation, and allows increasingly sustainable profit margins. Vertical marketing opens new doors, taps niche markets, and builds customer loyalty. When telecom providers focus on vertical market solutions, they move away from the commodity voice sale and toward higher-margin, value-added services.

Mobile Workforce and Enterprise Applications, 2011-2016

www.insight-corp.com/reports/mwv11.asp

Wireless technology has fully penetrated the enterprises and businesses of all sizes experience some benefits of a mobile workforce. As enterprises increasingly look to expand customer service, the next generation of wireless products and services will enable more robust applications to support an expanded mobile workforce. Over the past decade, wireless networks, devices, and applications have been developed to support the most basic enterprise applications, and these developments were largely independent of the enterprise applications on the wireline side, which were expanding to support broadband access to intranet and Internet applications. The next few years will see an increasing integration of wireline and wireless applications, enabled by new technologies such as IMS, 3G networks, smartphones, and WiMAX devices.

This report will provide a detailed analysis of the wireless technologies, application platforms, and workforce trends that will accompany this integration. Carriers, device manufacturers, software companies, and application providers are swarming around this market, searching for the key set of features needed to win in the high-margin, enterprise application space. Mobility and IP convergence will be examined, along with fixed-mobile convergence, IMS, and content services. We will examine wireless enterprise developments on a global basis and provide best-in-class examples of integrated applications aimed at the enterprise. Insight will provide forecasts of enterprise wireless service demand by wireless application type as well as demand by vertical industry.

Telecom, IT and Healthcare: Wireless Networks, Digital Healthcare and the Transformation of US Healthcare, 2012-2017

www.insight-corp.com/reports/telehealth12.asp

In the US, the \$3 trillion ecosystem of hospitals, physicians, pharmaceutical companies, and insurance providers that make up the healthcare industry will be spending over \$100 billion between now and 2017 on telecommunications services and equipment. The healthcare industry in Europe, Asia, and Latin America is similarly challenged. The compound effect of an aging population and advances in clinical treatment technologies will require new healthcare delivery systems that can synthesize diagnostic data, provide immediate clinical recommendations, and build a repository of healthcare information that will advance future treatments.

Rising healthcare industry costs and a shortage of skilled staff have created a lucrative opportunity for technology and service providers, as hospitals and other front-line healthcare providers look to adopt new technologies and outsource procedures to low-cost providers. Fiber optics, wireless access, and digital transmission will transform healthcare networks while extending care to remote patients via telemedicine applications. This industry is methodically moving towards a new generation of networking technology and electronic patient information.

This study examines the transformation of global healthcare information technology, trends in provider care, and forces that shape this massive industry. We survey a number of hospitals and care providers and make recommendations for telecom service providers, equipment manufacturers, and systems integrators who address this industry. The study identifies key demographic and technology drivers that will shape this transformation. Finally, we provide five-year revenue and unit forecasts for hardware and network services, by healthcare segment, by technology.

VoIP and the SME: CableCos, Telcos, the Rise of Hosted Service Models, 2011-2016

www.insight-corp.com/reports/voip12.asp

In the quest to squeeze additional revenues from their infrastructure, cable companies have launched a full scale blitz on business markets. Telcos are now contending with CableCos and upstart hosted service providers that are providing enhanced VoIP services into this hotly contested market.

In a new research study, Insight's analysis reveals that more than three million small and medium businesses are geographically located within two-way capable cable systems, a veritable gold mine of captive customers for cable MSOs. By factoring in home-based businesses as well, the near-term opportunity created by this market is well in excess of 20 million lines.

This study analyzes enhanced VoIP services that are made possible by today's technology—complete suites of unified communications including data, video and unified messaging geared and priced for the unique business requirements of SMEs. Based on this examination, we quantify the SME business line addressable market opportunity by vertical industry for VoIP and unified hosted services and measure the competitive risk they pose to the incumbent telephone carriers.

Custom Research

When faced with a challenging assignment, Insight Research's expert staff of telecom professionals can make the difference. We begin every project by working with our clients to develop a set of objectives, carefully documenting the elements of work, and setting realistic schedules and deadlines. Our clients know that we are responsive, provide value, deliver on time, and always adhere to the strictest levels of confidentiality.

Call Insight today to learn how our custom capabilities can assist you. Our custom research clients have recently benefited from studies on the following topics:

- Survey and Census of Rural Telcos (*US Rural Telecommunications Associations*)
- White Paper: "Study of FM Radio-Enabled Handsets in the US" (*US-based Broadcasters Association*)
- Outside Plant New Product Analysis (*Domestic Manufacturer*)
- Pricing Analysis and Competitive Assessment of Converged Service Offer (*The Major Domestic Carrier*)
- Wholesale Markets Revenue Assessment (*Large Domestic Carrier*)
- Competitive Assessment of Video Services Capabilities (*Large Domestic Carrier*)
- Domestic Private Line Provisioning Intervals (*RBOC*)
- Cloud Computing Analysis (*Overseas Carrier*)
- Market Potential for New Technology (*Start-Up Company*)
- Wireless Intellectual Property Market Evaluation (*State-sponsored R&D Directorate*)
- Analysis of Customer Buying Criteria (*OSS Provider*)
- Wireless Data Wholesale Revenue Opportunity (*International Carrier*)

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Recent Insight Reports

Web 2.0, Mobility and Fixed Line Applications: The Revolution in New Applications Development, 2011-2016

www.insight-corp.com/reports/web2011.asp

The ubiquity of Internet access has created a new set of technologies and business models known as "Web 2.0"—and it has already made significant changes to fixed line and wireless application development and deployment. This report explores the implications of the convergence of fixed line, mobile broadband, and Web 2.0. We describe the technologies for application development and deployment, the capabilities of mobile devices and networks, and how they change the game for users, operators, and app developers. We project markets for apps and discuss the impact of a Web 2.0 application deployment model on network operators.

Open Source Impacts on Telecom Services, 2011-2016

www.insight-corp.com/reports/open10.asp

In the coming decade, open source software will significantly impact how telecom carriers create, deploy, manage, and bill for new services. Revenue models for commercial offerings are becoming increasingly mainstream, and carriers' specific requirements for network service components are being met through new innovations in software architectures. This study looks at how open source packages fit into carrier-class operations and examines the various types of telecom organizations that are trialing open source and the impacts that this software will have on "traditional" telecom software vendors (ISVs). We forecast telecom open source software-driven revenue related to the creation of new services, and carrier investment in open source platforms.

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Telecommunications and Capital Investments 2010-2015: Looking Beyond the Financial Crisis

www.insight-corp.com/reports/invest10.asp

This report explores the impact of the financial crisis on the telecom sector in quantitative terms, especially on capital investments such as optical equipment and fiber and Ethernet and Sonet equipment. The analysis focuses on operators in North America, key EU member states, and select Asian countries.